



## CONFERENCE SERVICES

### STEP-BY-STEP GUIDE

This STEP by STEP guide is intended to help you through the process of working with Conference Services to plan an event.

#### QUICK REFERENCE TOOLS

- [Our Services](#)
- [Sample Agenda](#)
- [5 Points of Compliance for Food & Beverage at LBNL Events](#)

#### STEP 1

Read the Policies and Conference FAQ's

- [Policies](#)
- [FAQ's](#)

#### STEP 2

Review what kind of help Conference Services can provide.

- [Our Services](#)

#### STEP 3

Determine if the Event is a Meeting or Conference

In order to qualify as an official Laboratory-hosted/co-hosted conference or meeting, several prerequisites or criteria must be met as outlined in the Laboratory's Event Questionnaire. A determination must be made for each Laboratory **Event** as to whether it qualifies as an official Laboratory-hosted/co-hosted **Conference** or a Laboratory-hosted **Meeting**.

- [Event Questionnaire](#)

#### STEP 4

Review appropriate approval paperwork for Meeting or Conference  
Review the information you will need to gather to fill out the approval forms

- [Conference Forms](#)

#### STEP 5

Create a Working Agenda

- Sample Agenda

#### STEP 6

Request a Conference Planner be assigned to your Event.

- Email us at [ConferenceServices@lbl.gov](mailto:ConferenceServices@lbl.gov)



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#### STEP 7

Review your Event with your assigned Conference Planner

Now is the time you will discuss how you will move forward, gather information, establish roles and responsibilities, discuss registration, begin a timeline, discuss allowable/unallowable expenses, etc.

#### STEP 8

Create Budget

The budget is created by the Host of the Event and the Division Resource/Budget Analyst. Conference Services can provide guidance with this process but the division is responsible for creating and monitoring the budget and revenue throughout the Event planning process.

#### STEP 9

Proposal Review and Site Selection

Together with your Conference Planner you will review the proposals sent by hotels, schedule site visits and select the hotel that best works for your event.

**Per the Policy: ONLY Conference Services can sign contracts for events**

At this time you will also confirm that you have all the necessary information to complete the approval request, which is the next step.

#### STEP 10

Request Event Approval

- [Event Approval Database](#)  
You must take the [Event Approval Database Training](#) to be granted access to use this Tool.

#### STEP 11

Approvals

Event approval will be sent via email. Please print all approval notifications and supporting documents. Divisions should create a central file location for all event approvals.

#### STEP 12

- [Request BZ Project Id's](#)  
BZ Project Id's are required if you are collecting registration fees.



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#### STEP 13

##### Registration

LBNL uses an on-line registration tool called RegOnline. To begin the process of setting up a registration page, please fill out the RegOnline Request below.

- [RegOnline Request](#)

#### STEP 14

##### Detailed Planning and Logistics

You will work with your Conference Planner to plan the meeting details needed for the event. This includes, timeline, meeting space, AV services, food and beverage, transportation, entertainment, special events, staffing, etc.

**Per the Policy: ONLY Conference Services can sign contracts for events**

#### STEP 15

##### Pre-Event Logistics Review

This is the last meeting before your event. This meeting will include the Conference Planner and all personnel who will be working on-site at the event. The Logistics Schedule will be distributed and reviewed from start to finish.

#### STEP 16

##### At the Event

Your Conference Planner will work with you to coordinate the successful outcome of your event.

#### STEP 17

##### Billing & Reconciliation

Invoices will be sent directly to the division for review and submission for payment.

#### STEP 18

##### Conference Closeout

When you have received all the event income and all the bills have been paid, the Conference Closeout worksheet is submitted to Conference Services. It will then get sent to accounting and the BZ Projects will be closed.